
Tridion 2013
Content Management System
Getting Started

June 30, 2016
Steve Klaus

Table of Contents

Part 1 – Introducing Tridion Content Management System	3
A. Content Manager	3
B. Publications	3
C. Website Building Blocks	4
Part 2 – Content Management	5
A. Create a new General Content Component	5
B. Create a new Multimedia Component	6
C. Edit content – add image	7
D. Edit content – add hyperlink to work document	8
Part 3 – Website Management	9
E. Assemble a page – add component created above	9
F. Publish the page to stage	11
3. View your content on staging (or live) to verify it published successfully	11

PART 1 – INTRODUCING TRIDION CONTENT MANAGEMENT SYSTEM



Today's Training Objectives:

- Understand Tridion's basic Website Building Blocks
- Create a Content Component
- Understand the value of Metadata and how to enter it
- Create and use Multimedia Components
- Edit content and Insert an image component
- Link to native document (Multimedia Components)
- Assemble a page and publish it

A. Content Manager

You can create content using the Content Manager Explorer—a browser-based interface that you can use to access, create, edit, and publish content. Multiple authors, editors and designers can contribute, allowing you to collaborate and align your content objectives.

You can maintain Web content throughout its entire life cycle: from adding new content to publishing the content to your Web site. All versions are saved, thereby allowing you to view and track changes.

Content and design elements are created separately and then combined to create Pages in a Web site. You can:

- Create content, which can include text or multimedia content.
- Determine the layout using templates that define the look-and-feel of published content.

Components and Templates are the building blocks of Pages, and they can be reused and combined to create content across multiple Web sites and Pages.

B. Publications

In the Content Manager, all Web site building blocks are saved in Publications. A Publication is a collection of content and layout items. Often, a Publication represents all of the building blocks that you use to create a Web site.

A Publication organizes content using Folders and Structure Groups. Folders store content and design items, while Structure Groups store Pages.

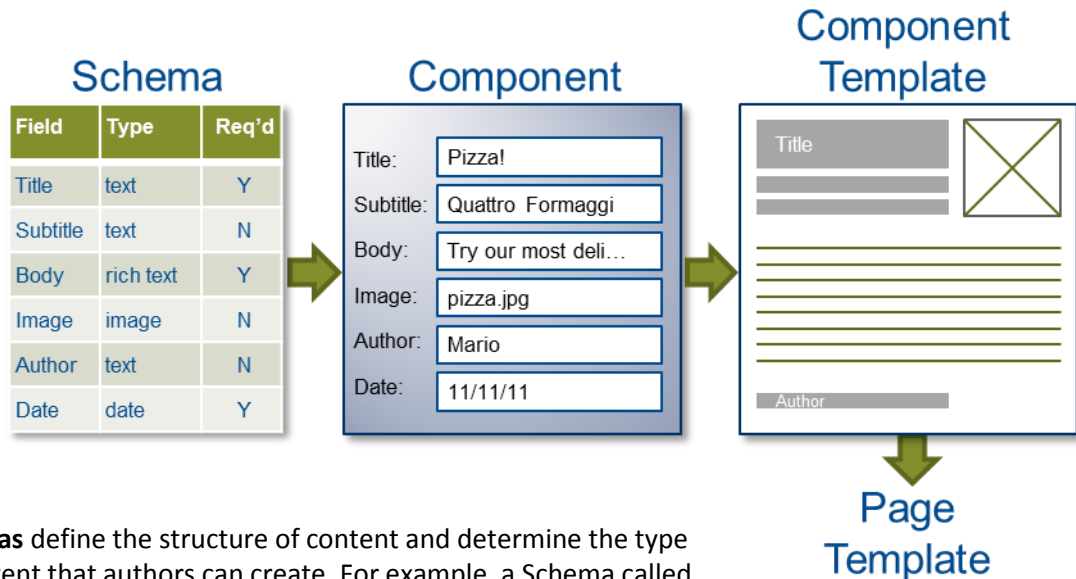


You use a publication to:

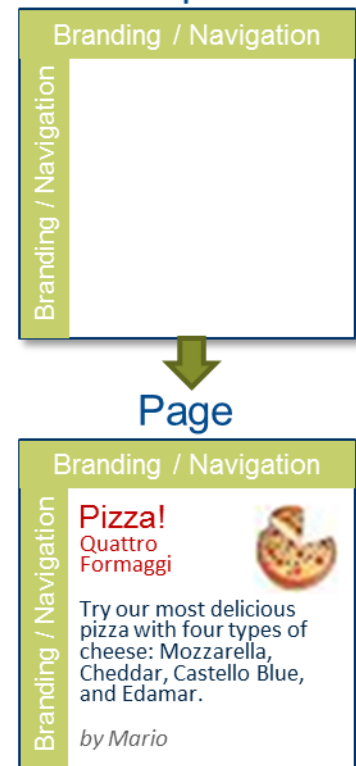
- Create, organize, and manage content, layout, and Pages
- Manage user access using permissions and rights
- Create and initiate Workflow processes so that users create and edit items following a predefined set of activities
- Share and reuse content
- Create your website's URL structure through Structure Groups

C. Website Building Blocks

The Content Manager allows you to create content and layout items separately and then combine these items to create publishable Pages. This enable each person do do what they do best. Authors can create content, designers can design the look-and-feel of Pages, and editors can determine what content is published where. Your role determines which of these building blocks you will use.



1. **Schemas** define the structure of content and determine the type of content that authors can create. For example, a Schema called "Press Release" could define the following fields:
 - Headline
 - Date
 - Summary
 - Body
 Components based on this Schema share the structure defined by the Schema.
2. **Components** are text or multimedia content based on Schemas. In the Content Manager Explorer, Components are generally displayed as forms that content authors can fill in.
3. **Component Templates** display the contents of a Component using scripting and HTML formatting.
4. **Page Templates** determine which Component Presentations a Page displays and determines the overall layout of the Page. A Page Template often determines the branding (the look-and-feel) of the Page.
5. **Pages** combine a Page Template and one or more Component Presentations.



PART 2 – CONTENT MANAGEMENT

A. Create a new General Content Component






The Big Idea: In Tridion all content is saved as Components. To ensure that content is consistent, the Content Manager bases all content on Schemas. Schemas define fields and field types for specific types of content, such as Articles, Toggle lists, Galleries, etc.



Try It!

- Create a new content component
- Choose the appropriate Schema for the type of content you're adding
- Enter Metadata to make searching more effective and the actual content that will display on the web page

Action Steps:

1. Navigate to **[020 Your Publication Content] > Building Blocks > Website Content Components > Getting Started**
2. On the **Create** tab of the Ribbon, click on the **New Component** icon 
(or Right-Click, New, Component)
3. **General Tab** – Fill in fields
 - a. Name (used by CMS – does not display)
 - b. Schema: Select **General-Content-Schema**
 - c. Title: Can be same as Name
 - d. Short Description
 - e. Body text: This is the content that will display
4. **Metadata Tab** – Fill in fields
 - a. Title: Can copy Name/Title from General tab
 - b. Short Description: Can copy from General tab
 - c. Subject/Keywords (one word or phrase per entry – use insert button  to add more entries)
5. On the **Home** tab of the Ribbon, click **Save & Close** 

B. Create a new Multimedia Component



The Big Idea: Multimedia Components store multimedia information such as images and common file formats such as PDF and Microsoft Word documents.

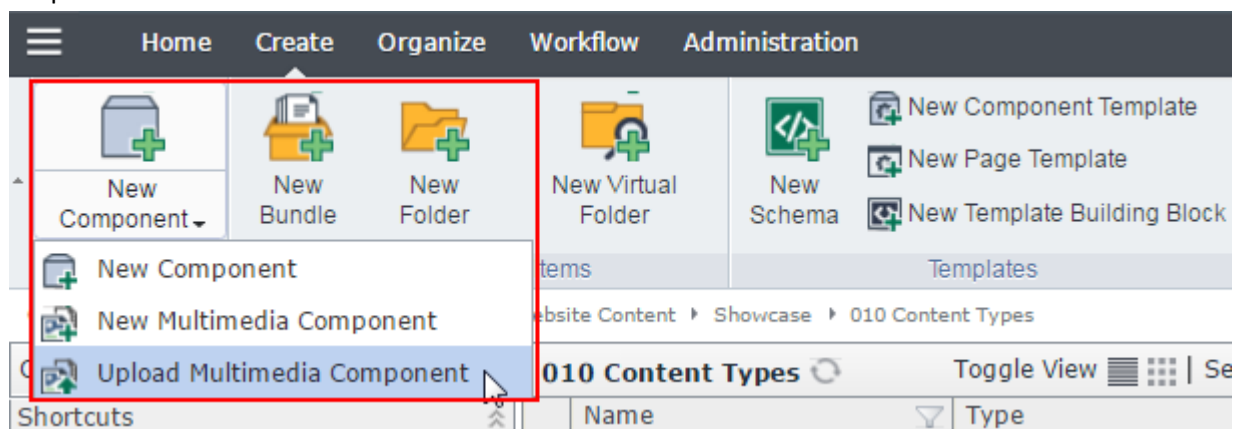



Try It!

- Create multimedia components using Image, PDF, and Word source files
- You will add these multimedia components to your Content Component in a later lesson

Action Steps:

1. Navigate to **[020 Your Publication Content] > Building Blocks > Website Multimedia Components > Getting Started**
2. On the **Create** tab of the Ribbon, click the bottom of the **New Component** icon to open the dropdown menu.



3. In the dropdown menu, select **Upload Multimedia Component**
 - 1) Browse to the multimedia file you want to load
 - 2) Click **Open** (or Double-click on the file)
 - 3) Click **OK**
- b. Click on **Save and Close** 
4. Repeat these steps for an image file, a PDF file, and a Word or Excel file.

C. Edit content – add image



The Big Idea: Remember, you must have first created a Multimedia component that contains your image.



Try It!

- Add an image to the component you created in Lesson A above
- Apply a style to the image to format borders and padding around the image

Action Steps:

1. Open the Content Component created in Lesson A. (**Double-click** on the component or Right-Click, Open.)
2. Add an image component to the Body Text field
 - a. Find the location in your text where you would like the image to appear, and click to place your cursor there.

- b. Click the **Image** icon in **Format** tab of the Component Ribbon.



When the Image Dialog box opens, click the **Browse** button.



A browse dialog opens.

- 1) Navigate to the folder containing the image you wish to insert. (For this exercise, use **Building Blocks > Website Multimedia Components > Getting Started.**) Select an image and click **Insert** to return to the **Image** dialog. The **Image** dialog shows the selected image.
 - 2) Click **OK** to close the **Image** dialog.
 - 3) By default, images are shown with a placeholder in the format area.
- c. (Optional) You may format the image display by applying a style to the image which controls alignment, borders , and padding.

Click on the image, select 'style' from dropdown menu:

- PhotoLeftwithBorder (aligns the image to the left, with rule border, with padding)
- PhotoLeftnoBorder (aligns the image to the left, no border with padding)
- PhotoRightwithBorder (aligns the image to the right, with rule border, with padding)
- PhotoRightnoBorder (aligns the image to the right, no border, with padding)

3. On the **Home** tab of the Ribbon, click **Save and Close**



D. Edit content – add hyperlink to work document






The Big Idea: When linking to a component, always remember to Publish the component in a page first or your link will not work.



Try It!

- Add a hyperlink to another component.
- For this exercise you will link to a pdf file.

Action Steps:

1. Open the component created in step 1.
2. Add a hyperlink in the Body Text field
 - a. Find the location in your text where you would like to add the hyperlink, and **highlight the text** that you want to use as a hyperlink.
 - b. Click on the **Insert Hyperlink** icon on the tool bar  (icon with chain links)
 - c. The Hyperlink Dialog box will appear
 - 1) In the Type field, select **Component**, which allows you to choose a Content Component
 - 2) Click on the **Browse** button  (icon of a folder with a magnifying glass)
 - a) Navigate to the **Building Blocks > Website Multimedia Components > Getting Started** folder
 - b) Select the component you want to link to and click **Insert**.
 - 3) (Optional) In the Title field, describe the contents of the link. When published this text is rendered as a tooltip by most browsers.
 - 4) In the Target field, select **(default)** which will load the new document in the same window.
 - 5) Click **OK** to save your choices
3. On the **Home** tab of the Ribbon, click **Save and Close** 

PART 3 – WEBSITE MANAGEMENT

E. Assemble a page – add component created above





The Big Idea: Page Templates control the layout and design of your page. Component Templates control the layout and design of the individual components within the page. Together they can give your website a consistent look and feel without requiring every content manager to be a graphic designer.



Try It!

- Create a new page
- Apply a style to the page by choosing a template
- Add you content to the page.

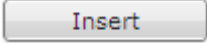
Action Steps:

1. Navigate to **[050 Your Publication Website] > Root > Getting Started**
2. On the Create tab of the Ribbon, click on the **New Page** icon 
(or **Right-Click, New, Page**) to create a new page
3. **General Tab**
 - a. Name: [Your first name] Essay about the State of Minnesota
 - b. File Name: enter your file name (use index if this is the main page in the structure group)
 - c. Page Template: (Deselect Inherit from parent if you want to change – for this lesson you will use **Internal General Content**)
 - d. Metadata Schema: accept default (**Page Metadata Schema**)
 - 1) Title
 - 2) Page Description
 - 3) Site Template: do not change
 - e. Dublin Core required fields, recommended:
 - 1) Title
 - 2) Description
 - 3) Subject/Keywords (one word or phrase per entry – use insert button  to add more entries)
 - 4) Additional optional fields

4. **Component Presentations Tab**

(Add components in the order listed)

a. Add **Content components** and corresponding **Component Templates**

- 1) Click **Insert** 
- 2) Navigate to **[Your Publication] > Building Blocks > Website Content Components > Training – Lesson Plan 1**
- 3) Select **[Your Content Component]** (Note multimedia files cannot be added directly to pages – see Multimedia cheat sheet for more information)
- 4) Component Template: Select **General Content - global**
- 5) Click **Insert Button**
- 6) Select **Close**

5. On the **Home** tab of the Ribbon, click **Save and Close**



F. Publish the page to stage



The Big Idea: Publishing a page makes it visible to users with a web browser. A page cannot be viewed outside of the Tridion Content Manager until it is published.


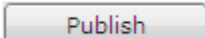


Try It!


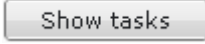
- Publish the page
- Verify publishing status in the Publishing Queue
- View the page in a web browser and fix any errors

Action Steps

1. Publish a Page

- Navigate to **[050 Your Publication Website] > Root > Getting Started**
- Highlight the page you want to publish
On the **Home** tab of the Ribbon, click on the **Publish** icon 
(or **Right-Click** on the page and select **Publishing, Publish**)
- Check the target server: **Live** and/or **Stage**.
- Click the **Publish** button 

2. Check the Publishing Queue

- On the **Home** tab of the Ribbon, select **Publishing Queue** 
- Select **your user name** from the **User** pull-down menu
- Click the **Show tasks** button 

3. View your content on staging (or live) to verify it published successfully.